

HOW TO... Create a form

Creating a form on your PC is simple. Ensuring it is easy for users to fill in onscreen isn't quite so straightforward – unless you follow Jennifer Bagley's guide

A form, whether it is a holiday request or a lengthy survey, is simply a document. It therefore makes sense to use your word processor to create one. Microsoft Word and StarOffice Writer make this particularly easy, as both programs have a dedicated Forms toolbar. Here we've used Word 2003, but this tutorial will also work in earlier versions to Word 2000 and in StarOffice Writer 7 and 6.

When creating a form, it can be tempting simply to type out all the different components, such as the lines indicating where information needs to be entered. This is fine if your form is just a one-off or you're confident that no-one is ever going to want to fill it in onscreen. However, encouraging people to fill in your forms on their computers, rather than writing on printouts, means you'll get far more legible results.

1 Create your form as a template. In Word, select Save As. Give your file a suitable name, then click in the Save as type box. From the drop-down menu that appears, select Document Template. This will put a .dot extension on your file.

In StarOffice, save as a Text Document Template. If you're using the AutoPilot to create your form (see 'At a Glance', opposite), accept the default Text Document file type.

2 Open the Forms toolbar in Word. You'll find it by clicking on the View menu,

then selecting Toolbars, Forms. When a toolbar is displayed, a tick appears next to its entry in this menu.

In StarOffice Writer, click on the Show Form Functions button. This opens a floating Form Functions toolbar, shown in the screenshot for this step. If this button isn't visible, right-click on the toolbar and select Customize. From the list of Available Buttons on the left select Controls and scroll down to Show Form Functions and click on Add. If, when the Form Functions toolbar opens, nearly all the buttons are greyed out, click on the Design Mode On/Off button.

3 Start to enter some details on the form. It will most likely begin with a line that states the form's purpose. Our form is being used to gather information about the members of a club and the way they use the club facilities. In this example, the first line needs to contain the person's membership number, followed by their name. You could indicate where people should fill in details by creating boxes (using the Table tools in Word), using the underscore key to create a line or by leaving blank spaces, but a much better way is to use a field.

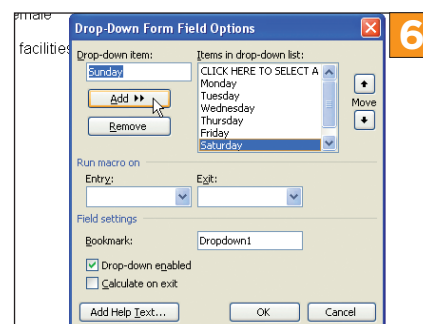
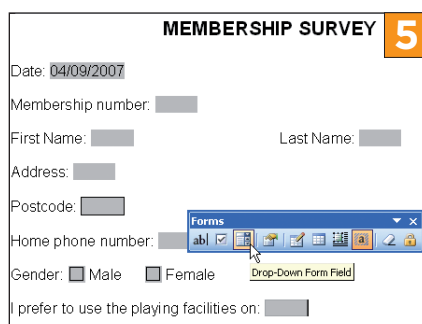
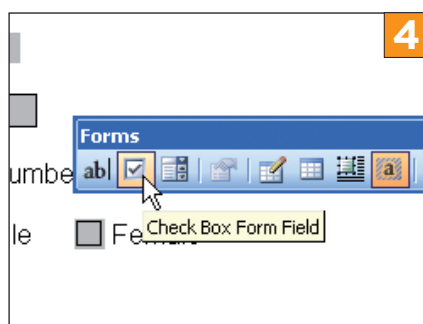
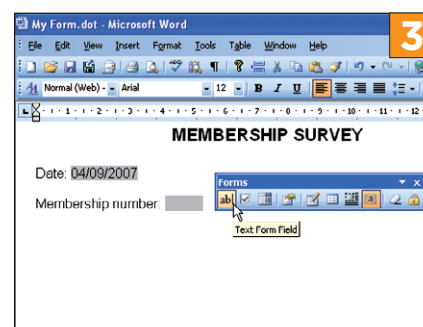
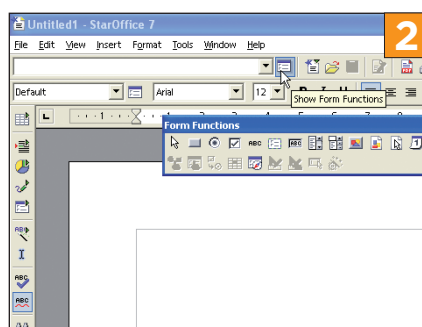
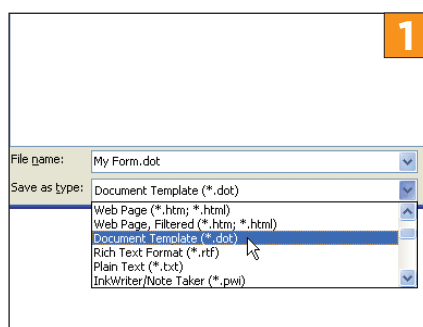
There are three types of field available in Word: Text, Check Box and Drop-Down Menu. For example, enter Membership Number on your document, then click on the first button on the Forms toolbar; this is the Text Form Field button. In StarOffice there are a much larger number of

fields available; you can also include push and option buttons, for example. The Text Field is a box that can be resized. A quick way to start your form in StarOffice is to use the AutoPilot. After you've done that, you can rearrange, add, remove and alter fields. It is also possible to add fields one at a time. Click on the appropriate button on the toolbar, then click and drag your cursor on the page, where you want the field to appear.

4 Check boxes – or tick boxes – are commonly used on a form where there are a small number of possible answers. The person filling in the form places a tick or a cross in a box next to the relevant answer. When a form is filled out electronically, the person just needs to click on the box to select it.

For our example, we need a good idea of how to allocate the changing rooms at the club, so finding out whether a member who signs up is male or female is useful. Click on the Check boxes button; it is second on the Forms toolbar in Word and the fourth button in StarOffice.

5 When you've a longer list of possible answers for people to choose from, tick boxes aren't so suitable as they will take up too much space. You could use another Text Form Field and get the person filling in the form to type the answer. For filing purposes, however, it is much easier if answers are entered in a



uniform manner. You can guarantee this by using a drop-down menu. In Word, click on the Drop-Down Form Field button; it is the third button on the Forms toolbar. A grey field identical to the Text Form Field will appear on your form, where the insertion cursor was placed. Double-click on this to open the Options dialog box.

In StarOffice, click on the List box button and draw your field on the page. The AutoPilot will open; if you want the list to include items from a data source such as a contacts list, use this. To create your own list, close the AutoPilot.

6 In Word, enter items to appear in your menu in the top left-hand box. Then click on Add. The first item in the list will be visible on your form. For this reason, the first item in our drop-down list is 'Click here to select a day'. Use the add and remove buttons and the up and down Move buttons to edit your list. When you're done, click OK.

In StarOffice, right-click on the List box you created in Step 5 and select Controls. Enter items in the List Entries list on the General tab, and press Shift and Return to move to the next line. Select Yes in the Drop-down box. Go to the Data tab and enter the list of items in the List content box. Close the box and save your document.

7 Now that we've got the basic elements of our form together, it's time to test it out. The last button on the Forms toolbar in Word looks like a padlock. This is the Protect Form button. Click on it. The fields will now be activated. You can type directly into the Text Form Fields next to first name and so forth. Click on one of the tick boxes to make sure they work and in the drop-down menu, to see how it looks.

To make sure everything works in StarOffice, click on the Design Mode On/Off button.

8 You can do a bit of fine-tuning to your form. Click on the Protect Form button, or the Design Mode button, to unlock the template. In Word, all the fields that you've placed on the form are shaded in grey. These won't appear on

the printout, although they may still look grey in the print preview. If you don't want this to be visible, click on the Form Field Shading button, which is third from the right on the Forms toolbar.

9 The text you've entered on the form can be formatted in exactly the same way as text on any other document. Use the Tab key, for example, to provide better spacing between the First name and the Second name.

A form can be tidied up considerably by using the Table tools. In Word, the Insert Table button on the Forms toolbar can be used to draw up a small grid on the page quickly, but for more options use the Insert command from the Table menu. In StarOffice, click on the Insert button at the top of the left-hand toolbar.

10 In Word there are a few ways to tweak the way in which the fields work on your form.

For example, click on the field next to Postcode, and then on the Form Field Options button. Postcodes are written in upper case. If you select that option from the Text Format box, when someone enters a postcode in lower case it will be automatically capitalised when they move to the next field. We know that postcodes are never more than seven characters and digits and that there is a space after the first three or four, so we've entered '8' in the maximum length box.

To adjust a field in StarOffice, click on it then on the Control Properties button. You can limit text length, but you don't get the formatting options available in Word, so Steps 11 and 12 don't apply to StarOffice.

11 There are a number of different pre-set formats you can apply in Word's Text Form Field dialog box. For example, click in the Type box and choose Current date. This will automatically place today's date on the form when it is opened, and the user won't be able to change this when the form is protected.

12 Text fields are a great way to keep your forms nice and tidy, but they don't help if

STAROFFICE AUTOPILOT AT A GLANCE

■ A quick way to create a form in StarOffice is to use the AutoPilot. This is especially useful if your form is based on a data source such as a contacts database. Go to the File menu and select AutoPilot Form. This opens the AutoPilot wizard. You then just need to follow the onscreen instructions.

■ You can change any of the elements in the form that AutoPilot creates. To change a Text box to a List box, for example, make sure that Design Mode is on and right-click on the field. Select Group, Ungroup. Click outside the box to deselect it, then click on it to select it. Right-click and this time choose Replace With, List Box. Click on the Control Properties button to enter items for the list, as described in Step 10.

the user has to enter a lot of text. However, form fields don't work if your form isn't protected, and when your form is protected users can't enter text anywhere except in a field. A way around this is to divide your form into sections and only protect specific sections.

We want to add a comments section to the bottom of our form. Click at the end of the form to place the insertion point there. From the Insert menu, select Break. In the dialog box that appears, select Continuous and click OK. This places a section break in your document, without creating a new page. Now, instead of using the Protect Form button on the toolbar to lock your form, select Tools, Protect Document. In Word 2003, a panel appears. Tick the box next to Allow only this type of editing in the document. This will activate the drop-down menu underneath. Click on this and select Filling in forms. A blue 'Select sections' link will appear. Click on this and tick only the box next to Section 1. Click OK, and then the Yes, Start Enforcing Protection button.

In earlier versions of Word, you will get a simple dialog box. Select Forms and click on the Sections button. **ES**

